MEMBER SERVICES DIVISION DASHBOARD
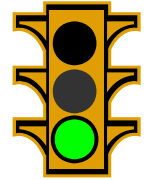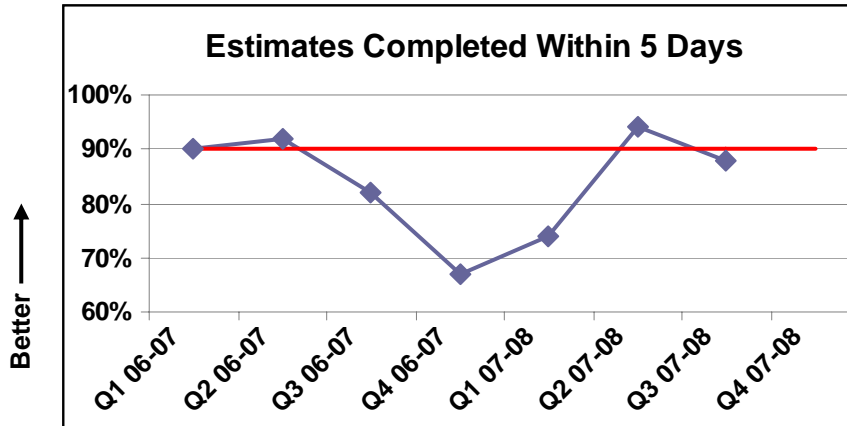
STRATEGIC GOALS
VI. *Administer pension benefit services in a customer oriented and cost effective manner.*

MEASURE:
Percent of workable estimates completed within 5 days of receipt.

Estimates Completed Within 5 Days

Target: *90%*

Year	Q1	Q2	Q3	Q4
2007-08	74%	94%	88%	
2006-07	90%	92%	82%	67%

INITIATIVES: *Improve Customer Service*

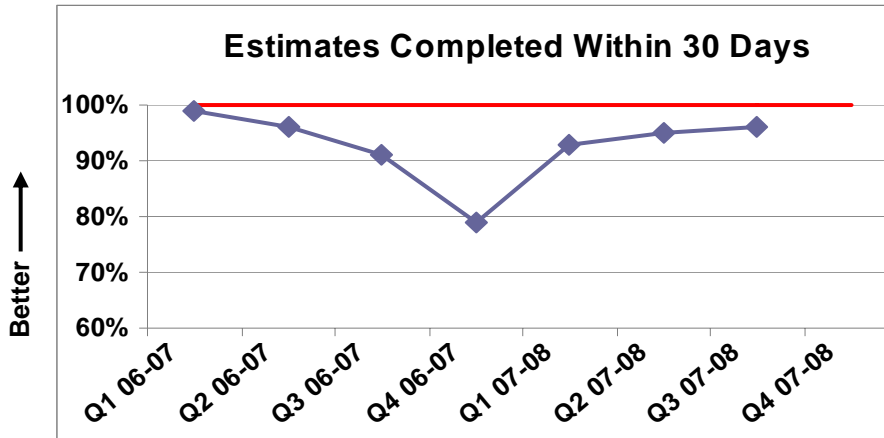| Initiatives	Milestones
• Fill Estimate Unit positions immediately upon vacancy. • Assist with technology enhancements. • Assess staff capacity. • Implement additional marketing and communication for members to better utilize self-service tools.	By June 30, 2008: • Complete online and system technology enhancements. • Complete PSR documentation of business requirements. • Continue training, marketing and communications.

COMMENTS:
- This table represents the percentage of retirement estimates that were completed within 5 days of receipt.
- Continued training of staff has positively impacted the completion rate of estimates and improved our customer service.
- The volume of estimates that require staff intervention has averaged 34% in both the 1st and 2nd quarters of 2007-08 but rose to 39% in 3rd quarter of 2007-08. The average in prior years has been about 24%.

3rd Quarter 2007-08

ATTACHMENT B-10

MEMBER SERVICES DIVISION DASHBOARD

CalPERS

STRATEGIC GOALS

VI. Administer pension benefit services in a customer oriented and cost effective manner.

Estimates Completed Within 30 Days

Better →

INITIATIVES: *Improve Customer Service*

Initiatives	Milestones
• Fill Estimate Unit positions immediately upon vacancy. • Assist with technology enhancements. • Assess staff capacity. • Implement additional marketing and communication for members to better utilize self-service tools.	By June 30, 2008: • Complete online and system technology enhancements. • Complete PSR documentation of business requirements. • Continue training, marketing and communications.

3rd Quarter 2007-08

MEASURE:

Percent of workable estimates completed within 30 days of receipt.

Target: *100%*

Year	Q1	Q2	Q3	Q4
2007-08	93%	95%	96%	
2006-07	99%	96%	91%	79%

COMMENTS:

- This table represents the percentage of retirement estimates that were completed within 30 days of receipt.
- The processing of estimates in both retirement date order and received date order has been fully implemented. This has improved customer service by providing more timely estimates, as requests with earlier retirement dates may normally be completed before requests with later retirement dates.
- The retirement estimates requiring staff intervention has averaged about 24% in prior years. In both the 1st and 2nd quarters of 2007-08 this workload has averaged 34% but in the 3rd quarter rose to 39%.
- The number of estimates received increased significantly in 3rd quarter 2007-08 to a monthly average of 9,330. The average in 1st quarter was 7,858 and in 2nd quarter was 7,930.
- Staff has put in extra hours to improve the 30-day completion rate, even while experiencing a significant increase in this time consuming workload.
- Two positions were upgraded this fiscal year allowing us to allocate more resources toward these more complex estimates.